



# City of San Diego



**May 1, 2004**

**Quarterly Report (January-March)  
Public Utilities Commission Decision 02-05-046, Rulemaking 01-08-028  
Project Reference Number 284-02**

**I. Program**

Whole House Energy Retrofit Incentive Program.

**II. Program Description**

The *Whole House Energy Retrofit Incentive Program* (the Program) is a local residential program aimed at homeowners who reside in homes constructed before 1978. There are three sub-groups of homeowners within this market that are being targeted by the program: (1) owners who submit plans for an addition or remodel of their home, (2) hard-to-reach homeowners in lower-income areas of the City, and (3) homeowners interested in reducing their energy consumption.

The incentive program is being marketed as a comprehensive package of benefits that includes: (1) the rebates available from San Diego Gas and Electric (SDG&E), (2) information about energy efficiency, (3) design and inspection assistance from the City, and (4) an additional financial incentive offered under this program. The comprehensive incentive offered under the City's program is additive to residential energy efficiency measure incentives available from SDG&E.

The incentive program is a whole-house retrofit plan. Program applicants are currently able to take advantage of three levels of incentives depending on the extent of the retrofit work they select. The third package was introduced through City of San Diego Water Bill mailers beginning April 14, 2003.

- ◆ Package 1. For homeowners who insulate their attic with R-30 insulation, install double-pane windows, install low-flow shower heads and wrap their water heaters (as appropriate) the retrofit incentive will be \$200 to \$600, depending on income level. (See Table 1 for incentive amounts for various income levels)

- ◆ Package 2. For homeowners who do all of the above and also install a new, high-efficient furnace, the retrofit incentive will be \$400 to \$800, depending on income.
- ◆ Package 3. For homeowners who insulate their attic with R-30 insulation, wrap their water heater (as appropriate), install low-e window film on all windows, and replace 50% or 10 (whichever is less) of their incandescent light bulbs with CFL bulbs, the rebate incentive will be \$300 to \$500 depending on income level.

Homeowners are responsible for selection, purchase and installation of the energy efficient materials and equipment required under this program. Information about acceptable energy efficiency levels of materials and equipment is provided in the program information brochures as well as the Program's website.

### III. Program Summary Data

#### 1. Aggregated Customer Information

The customer information is available in the Q4 worksheet of the Customer Information Workbook Q4. This customer Workbook contains the information of customers who applied and/or received rebates during this **quarterly reporting period only**.

#### 2. Applications Received and Not Yet Paid

Total Number of applications received Jan - Mar and Not Yet Paid (Committed)	12
Estimated amount of Rebate Incentives to be paid (Committed rebate and inspection fee dollars)	\$5,150
Estimated demand and energy savings as a applicable (Committed kW, kWh, Therms)	8kW, 2,666kWh, 1,520Therms

#### 3. Average Rebate Processing Turn-Around Time

This program is difficult to measure in terms of "turn around time". Simply defined, "turn around time" would be the time it takes to pay out a rebate from the date of initial application to the date the rebate check was created. In this case, the average rebate processing time is 6 weeks. However, our program allows citizens to apply to the Program before construction on their home is complete. This means they can generate a building permit application and be ready to schedule an inspection at their convenience. This makes the "turn around time" appear to be much longer than it needs to be since people apply to the program and they wait several weeks or even months before scheduling an inspection. The average "turn around time" from date of inspection to the date the rebate check is created and mailed to the customer is about 15 days.

#### 4. Total Applications Received

During this reporting period, there were 14 new applicants and 13 applicants who have completed the installation of the measures and received rebates. Those applicants who received rebates this quarter did not necessarily apply to the program in this quarter. This period no direct marketing material was sent out, but we continue to receive inquiries from past mail-outs and many people are responding as the program reached the termination date.

### **IV. Training**

The City of San Diego did not conduct any formal training sessions for its staff this quarter as the program came to a close. There is continual collaboration between City departments and personnel to ensure the most accurate information is available to the public.

### **V. Marketing**

There were no Marketing activities this quarter. As the program came to an end we received many inquiries about the program, mostly from people who we had spoken to months earlier. This resulted in a relatively large amount of last minute applications. Our total customer calls received as a result of the all direct mailings exceeds 1850.

The Whole House Program continued the educational component by performing 15 energy conservation presentations at several locations throughout the City of San Diego. These presentations were given to community clubs and organizations such as Kiwanis and Rotary.

#### ➤ Green Schools Program

The City of San Diego has been authorized by the CPUC to commit funds from The Program's Marketing budget for the City's existing Green Schools Program. The City of San Diego has committed \$28,000. The Green Schools Program consists of educating high school students through in-class lectures and guided energy audits of school facilities. Off campus, there is one service project per school where the students conduct another energy audit of a non-profit community center and lighting retrofits are installed on the selected building. The Green Schools Program also consists of a Youth Forum and a Perception Survey, studying the knowledge of energy conservation perceived prior to education versus post education.

During Quarter 1 2004, no further marketing was needed. All 14 high school lectures were completed (at 8 different locations) and 7 Community Centers were chosen and scheduled for energy audits/retrofits. High School students who participated in the lectures are invited to help audit a local Community Center and recommend the lighting

upgrades that follow the audit. All of the Community Center audits are complete, but the retrofits will not be complete until the end of May.

The Public Opinion Survey was also broadcasted online and randomly mailed out to citizens of San Diego. The data collection for the Survey is complete and the results are currently being tabulated with a final report scheduled to be complete by the end of May 2004. The data is being kept separate from the Online versus the Mailed-Out Survey to protect the interests of statistical significance. The Survey Report will be included in the Whole House Final Report.

The Youth Forum also occurred at the End of March 2004. This was a successful event with over 50 students participating. This event brought up concerns the youth see as important relating to energy conservation as well as other issues of sustainability. This event was video taped professionally and is being edited to air on the City of San Diego Television Channel.

The expenses for all Green Schools Activities during Quarter 1, 2004 totals \$5,538.83.

## **VI. Inspections**

There were 6 inspections paid and scheduled this quarter. All program participants who scheduled inspections during this quarter passed inspection.

## **VII. EM&V**

This quarter there has been quite a lot of activity concerning EM&V for this Program. The City was forced to amend the Access Agreement and resend to the identified sample of participants for EM&V. The response was very slight, leaving the City with only 3 participants to perform Program EM&V. The City obtained the billing histories of these three participants and passed them to the EM&V consultant. Activities will commence immediately and all will be presented in the Final Report due July 1, 2004. The City has committed the EM&V budget of \$63,500.

## **VIII. Budget Summary**

The budget summary shown in the table below represents the expenses that have been charged to the Program for **Quarter 4, 2003 ONLY**.

CATEGORY	CHARGED EXPENDITURES
Total Administrative Costs	\$59,717.07
Total Marketing/Advertising/Outreach Costs	\$5,538.83
Total Direct Implementation Costs	\$4,564.91
Total EM&V Costs	\$0
Total Other Costs	\$0
<b>Expenditures Grand Total</b>	<b>\$69,820.81</b>

The budget summary shown in the table below represents the expenses that have been charged to the Program **YEAR-TO-DATE**.

<b>CATEGORY</b>	<b>CHARGED EXPENDITURES</b>
Total Administrative Costs	\$293,238.14
Total Marketing/Advertising/Outreach Costs	\$67,770.61
Total Direct Implementation Costs	\$27,406.15
Total EM&V Costs	\$0
Total Other Costs	\$0
<b>Expenditures Grand Total</b>	<b>\$388,414.90</b>

### **VIII. Percentage of Program Goals**

The Program goals were adjusted through the submittal of the Program Extension Request. The percentage of goals achieved shown below reflects the new program goals established through the request. This is calculated using Year-To-Date expenditures without commitments.

<b>CATEGORY</b>	<b>% OF PROGRAM GOALS W/OUT COMMITMENTS</b>	<b>% OF PROGRAM GOALS WITH COMMITMENTS</b>
% of program spending	70%	98%
% of kW goal	43%	73%
% of kWh goal	28%	51%
% of therm goal	40%	67%
% of customer goal	46%	76%

### **VIX. Total Money Committed to Close Out Program**

<b>CATEGORY</b>	<b>TOTAL COMMITMENTS</b>
Total Administrative Costs	\$60,960
Total Marketing/Advertising/Outreach Costs	\$22,365
Total Direct Implementation Costs	\$7,712.48
Total EM&V Costs	\$63,500
Total Other Costs	\$0
<b>Commitments Grand Total</b>	<b>\$154,537.48</b>